

KEY SURVEY

ADMINISTRATION MANUAL



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TABLE OF CONTENTS

I - INTRODUCTION	4
HOW THIS MANUAL IS ORGANIZED	5
II – API FEATURES	6
API OVERVIEW	6
III – USER ADMINISTRATION	7
LICENSE ADMINISTRATION	7
ADD NEW ACCOUNT	8
USER ACCOUNT ADMINISTRATION	9
Searching for User Accounts	9
Important Tips	11
Editing User Accounts	12
Editable Fields	13
Features	16
LDAP USERS	22
SECURITY SETUP	24
TEMPLATE ACCOUNT	26
Creating Survey and Question Templates	26
Template Management	27
CSS Templates	28

I – INTRODUCTION

Key Survey Enterprise Solutions software is built for business, interfaced for the user and engineered for IT; it delivers a powerful, easy-to-deploy system for data gathering, evaluation and presentation that enables users, workgroups and even remote divisions to create accounts and collaborate on projects in a user-friendly, controlled and secure environment.

Key Survey Enterprise features a user-friendly interface to serve the needs of everyone in your company. There's no software to install or download -- all you need to use Key Survey Enterprise is access to a browser. Employees will get going quickly using ready-made templates or they can build custom surveys from scratch.

Users have total control over survey results. They can create and customize reports in real-time using any browser, display results in both text or graphic format - even export data to Excel, Powerpoint, SPSS, or other programs.

Key Survey Enterprise software is built to scale. It can handle any number of users. Any volume of emails. Any quantity of surveys. Use it to make any kind of form, application, or online test for training or assessment purposes. It's designed to meet your survey demands today, and grow with your company.

Key Survey Enterprise may be hosted on our secure servers or yours, or delivered fully configured and pre-loaded on a standalone server. Data is completely safe whether stored on your server or ours. Key Survey Enterprise offers the option of using secure SSL encryption. Administrative controls allow you to define and restrict employee access rights.

Key Survey Enterprise puts the administrator in complete control of all survey creation and survey deployment. The master administrator can create unlimited sub accounts and define access levels for all users.

Moving data across your enterprise is no problem for Key Survey Enterprise. It gives you the flexibility to pre-populate surveys, employ an API, and export data to other major applications like Excel, Powerpoint, or SPSS, or as a CSV file. It also prints to PDF for hard copy purposes.

HOW THIS MANUAL IS ORGANIZED

The manual consists of 2 sections (in addition to the Introduction).

- **Section II – API Features**

- This section provides you with information for accessing the survey system API (Application Program Interface). The API provides programmatic access to the survey system and allows you to perform the following functions:
 - Import responses into your survey
 - Distribute email messages with replacement tags in the email body
 - Receive respondent results

- **Section III – User Administration**

- This section provides you with the tools you need to search for and edit user accounts and other account information. You will also know how to setup LDAP

II - API FEATURES

API OVERVIEW

Key Survey API (application programming interface) service lets developers design computer programs that interact directly with the Key Survey platform. With these applications, customers and third-parties can more efficiently manage their Key Survey accounts.

Key Survey provides multiple API versions, which are the API v6.8, v6.9 and v7.3. It is strongly recommended to use the most recent version available for your enterprise edition.

The API documentation provides the information necessary to access the survey system API. To connect the custom code with Key Survey your program developer will need to get the account login credentials and use them in the API connection call. They are the same that survey administrator uses when needs to access the Key Survey account via regular user interface. If you need to set up an API call with a survey from a Multi-Access account, you must use master account's login details.

The API provides programmatic access to the survey system and allows you to perform the following functions:

- Creating and managing users.
- Designing and distributing surveys to respondents.
- Receiving respondent results.
- Developing additional tools and applications to help you manage accounts.

There are more details about Web Services, code examples and API versions in the online help of your application. Just click the HELP link in the top right hand corner of your account. Or please consult the detailed documentation for the [API system on WorldAPP KeySurvey website](#).

III – USER ADMINISTRATION

LICENSE ADMINISTRATION

To activate your enterprise application, 'license key' must be entered on the 'License' page. This is unique key that goes along with other installation materials or can be requested from the WorldAPP Sales team.

When you log in the application for the first time you are automatically redirected to this page. You can also access it by clicking the 'license' link at the very top of the administration account.

[Home](#) > [License](#)

License administration

To request a new license code please contact Sales Support.
Tel. 1(781) 849 8118. Email sales@worldapp.com

Please enter your license code below

Activate

Your current license status

Number of accounts	Unlimited
Number of sub-accounts	Unlimited
Credits available	Unlimited
URLs available	Unlimited
Expiration date	Dec 31, 2015

[← Back](#)

Enter your license key and click the **Activate** button. If your license key is correct, you will be prompted and license status in the right part of the page will be updated.

ADD NEW ACCOUNT

New user accounts can be added from your administration account.

1. Click the **Add New** button (see the picture in the Searching for User Accounts subsection on the next page).
2. Enter account details in the pop-up window. You can also provide other person with the link to this page, so account can be created from the other side by users themselves.

OPEN 30 DAY FREE TRIAL

First Name*

Last Name*

Company name*

Phone*

Email address*

Password*

Confirm password*

☐ I have read and accepted Key Survey [Terms of Use](#) and [Privacy Policy](#)

Sign Up

3. When this is done free trial account is created. Go back to your administration account and search for this newly created user. Perform any changes to it if necessary. For more details see the [User Account Administration](#) sub-section of this manual.

Note: Sub-accounts for Multi-User and Multi-Access accounts should be created within these accounts by account holders themselves.

USER ACCOUNT ADMINISTRATION

User account administration should be performed from the administration account of your application. Admin account login details go along with other installation materials and can be get from the Key Survey account coordinator or from the production group of your company who performed application installation.

Administration account allows you to search for and edit regular user accounts, change their type, expiration date, add or withdraw credits. Editable fields and their descriptions are shown in the Editable Fields table of this manual.

Searching for User Accounts

1. Access the User Search Screen by logging into administration account:

[Home](#)

Current [license](#) expires **Dec 31, 2010**

User ID

Email

Login

Survey ID

First Name

Last Name

Company

Phone

City, Country

Type

Any

Sign Up

From

To

Expiration

From

To

Credits

From

To

Status

Any

Show

100

items per page

Clear

Search

Add New

(0 total)

2. All the *User Property Fields* are searchable. Enter user data into any field to locate the user you want to edit. See the table below for descriptions of each user property field.

Properties	Description
User ID	The unique number of the user in the system.
Email	The email address of the user.
Login	The user login name.
Survey ID	The unique number of the user survey.
First Name	The user first name.
Last Name	The user last name specified in the account.
Company	The company name specified in the user account.
Phone	The phone number specified in the user account.
City, Country	The residence information.
Type	The dropdown box allows you to select the user type: - Any; - Single User; - MultiUser Admin; - WebPoll; - Multi-Access; - SubUser.
Sign Up	The 'Sign Up' field. The sampling includes those accounts with the Sign Up dates limited to the range specified in the 'From' and 'To' fields.
Expiration	The 'Expiration' field. The sampling includes those accounts with the Expiration dates limited to the range specified in the 'From' and 'To' fields.
Credits	The quantity of the remaining user credits. The sampling includes accounts with credits more or equal to the number specified in the 'From' field and less or equal to the number specified in the 'To' field.
Status	The dropdown box allows you to filter accounts by the following status: Any, Active, Locked.

Use the '**Show items per page**' dropdown box to indicate the number of returned records per page in the search results.

1. Click **Search** to begin the user search.
2. Click **Clear** to clear the data out of all fields.
3. Search results are returned and display the associated properties for all users that match the search criteria.
4. If the user account is a sub-account, the unique ID number of the master account displays in the **Master ID** column. This number is hyperlinked and clicking it allows you to enter the application through the master account login.

4

UserID 🔍	Login	Company	Expire 🔍	Credits 🔍	MasterID	Sign Up 🔍
2185	info@keysurvey.com	SSS	Jan 12, 2009	5056	27292	Jan 7, 2003
(1 total)						

Important Tips

Keep the following things in mind when entering search criteria.

- If you type 'partial data' into a search field, all results that contain that data excerpt (in that specific field) are returned. This is true on all search fields *excluding* the **Survey ID** field. For example, if you enter 'yahoo' in the **Login** field, all user accounts containing this domain name in their logins are returned in the search results.
- If you enter the number in the **Survey ID** field, only those user accounts tied to this survey are returned.
- If you leave all the fields blank, the entire list of user accounts is returned in the search results
- To add more credits to user account input positive integer number into the '**Credits**' field. To withdraw credits input negative integer number, for example: -35.
- Account password can be changed from that particular account by users themselves on the '**My Account**' page. It can be also reset by clicking the **Reset Password** button when editing user account, thus the notification email with a new password will be automatically sent to the email address associated with this account.

Editing User Accounts

1. Once you have located the user record you wish to edit, click the User ID link to open the user record.

Search results

UserID	Login	Company	Expire	Credits	MasterID	Sign Up
2185	info@keysurvey.com	SSS	Jan 12, 2009	5056	27292	Jan 7, 2005
(1 total)						

2. Within the user record, you can edit the 'Login', 'Login Expire', 'Add/Remove Credits' and 'User Type' fields. See the table on the next page for a description of these fields.

◀ Back
Next ▶

This Account Is Active [Lock Account](#)

User ID 11111 Login support@worldapp.com Password support ☐ Require password change at first login Reset Password Registration 2006-12-11 08:21:37.0 Login Expire 2010-05-31	Credits 78999 Add/Remove Credits Available subaccounts 61767; 64140; 66910; 66945; 66946; 66947; Subaccounts 50 Sessions 87 URL Suffix	User Type Multiuser Admin Name WorldAPP Support Company WorldAPP Phone (781) 849-8118 Email support@worldapp.com
---	--	---

Save
Show Rights
Show Details

3. Use **Back** and **Next** to browse through all results returned in the previous search.

Editable Fields:

Properties	Notes										
Login	Must be a unique record throughout the system.										
Login Expire	The date must follow the year-month-day standard. Eg. 2004-05-23.										
Add/Remove Credits	You can add or remove credits by placing the amount to add or remove in this field. A negative amount represents removal.										
URL Suffix	You can enter a suffix that will be used in all survey links of this account.										
User Type	Use this dropdown box to set the user type. <table> <tr> <th>User Type</th><th>Description</th></tr> <tr> <td>Single User</td><td>Users can design, edit and distribute surveys and view the reports.</td></tr> <tr> <td>Multi-User Account</td><td>Users can design sub-accounts in addition to the actions performed as a Single User.</td></tr> <tr> <td>Multi-Access Account</td><td>User can create multiple logins to his single user account and specify the access limits for other sub-users of this account.</td></tr> <tr> <td>Subaccounts</td><td>Shows number of sub-accounts for Multi-User and Multi-Access</td></tr> </table> Sub-accounts for Multi-User and Multi-Access accounts should be created within these accounts by account holders themselves.	User Type	Description	Single User	Users can design, edit and distribute surveys and view the reports.	Multi-User Account	Users can design sub-accounts in addition to the actions performed as a Single User.	Multi-Access Account	User can create multiple logins to his single user account and specify the access limits for other sub-users of this account.	Subaccounts	Shows number of sub-accounts for Multi-User and Multi-Access
User Type	Description										
Single User	Users can design, edit and distribute surveys and view the reports.										
Multi-User Account	Users can design sub-accounts in addition to the actions performed as a Single User.										
Multi-Access Account	User can create multiple logins to his single user account and specify the access limits for other sub-users of this account.										
Subaccounts	Shows number of sub-accounts for Multi-User and Multi-Access										

1. Click **Show Rights** to display all the features. Click **Hide Rights** to collapse the list.
2. Activate and deactivate the features by clicking to add and remove checkmarks. For more details see the 'Features' subsection of this manual.

Survey Design	Survey Launch	Survey Report	Import/Export Data (Integrability)	Other
☒ AddFooter	☒ AddressBook	☒ Advanced crosstab	☐ Enable API	☒ Navigation dropdown
☒ AdvancedLogic	☒ Alias	☒ Click Through	☒ Export to XML	☒ Salesforce APEX
☒ BackButtRem	☒ Anonymous	☒ Crosstab	☐ Export unique survey URL	☐ Dashboard
☒ BranchOnRange	☒ AttachFile	☒ EditResponses	☒ ImportRespondentData	☐ Dashboard Add/Edit
☒ CustPalette	☒ Autofill	☒ EmailReport	☒ PDFReport	☐ Section 508 Support
☒ CustRankScale	☒ BulkEmail	☐ Formula in text and images in reports	☒ PDFSurvey	
☒ CustTextFormat	☒ CustDomainName	☒ RemoteFilter	☒ Spss	
☒ EducationPackage	☒ DuplicateEmails	☐ Filtering uses wildcard	☒ Open In MarketSight	
☐ Image Align L/R	☒ EmailReminder	☐ Filtering uses regexp	☐ Correct XML Scales (from 1)	
☒ Language	☒ Manage bounces	☐ Filtering uses fulltext	☐ Unique export plugins	
☒ One Touch Script	☐ Panel filter	☐ Links answers		
☒ PreferredMatrix	☒ Password-Survey	☒ PrivateNotes		
☒ Preferred answer	☒ Redirect	☒ Question analysis code		
☒ Profile	☒ ReplyTo	☒ Filtering		
☒ RandAnswer	☒ SecureConnection	☒ ReportExpandText		
☒ RandQuestion	☐ URLAppend	☒ Report logo		
☒ RegularExpressions		☒ Response rate		
☒ WorkFlow		☐ Significance		
☒ 3DMatrix		☐ Share calculation		
☐ Copy survey with results		☐ Sort respondents by start date		
☐ Copy survey with reports		☒ Statistics		
☒ Answer Layout		☒ TimeSeries		
☒ Custom survey buttons				
☒ Image Position				
☒ Show Results				
☒ Custom CSS				
☒ Two color layout				
☒ Advanced Show/Hide				
☒ Common Plugins				
☒ Enterprise Plugins				
☒ Search				
☒ JavaScript API				

1. Click **Show Details** to display the feature that allows you to copy surveys from other accounts, remove surveys or restore deleted surveys. Click **Hide Details** to hide this feature.

16 → Select survey Chimes International, Ltd. Performance ▼

Type UserId OK

17 →

Buttons: Save, Show Rights, Hide Details, Cloning, Save

2. Use the '**Select Survey**' dropdown box to select the survey you want to copy.
3. In the '**Type User ID**' field, enter the User ID of the account you are copying this survey to.
4. The *Deleted on* column indicates the date a survey was deleted and the *Survey Name* field indicates the survey's name. The *Credits* column displays the number of credits used for viewing the results of this survey.
5. Click any of the *Restore* icons, to restore a deleted survey.
6. Click any of the *Remove* icons, to completely remove a survey from your account.
7. Once you have finished editing, click **Save** to apply changes.

Features

This is a list of features, their descriptions and where in the survey application these features are used

Features	Description	Used In
3D Matrix	Allows to use the '3D Matrix' question type.	Edit Questions
AddFooter	Allows user to add header and footer to a survey.	Survey Header Survey Footer
AddressBook	Allows users to create an address book. This feature is useful for sending out surveys to email distribution lists.	Address Book Email Survey Using Address Book
Advanced Crosstab	Allows users to create 'Advanced Crosstab' tables in the survey report. This report is used to compare survey responses according to the respondent groups.	Advanced Crosstab
Advanced Logic	This option activates advanced logic which is used to make flexible survey structures.	Edit Questions Logic
Advanced Show/Hide	This feature allows applying conditional showing or hiding answer choices.	Edit Questions
Alias	Allows user to customize the 'From' email address for the launch, reminder and report emails.	Compose Email
Anonymous	Allows user to perform anonymous survey distribution.	Survey Launch Email Survey
Answer Layout	Allows selecting the answer layout vertically (down) or horizontally (across) when adding or editing the specific multi-choice question.	Optional Features
Attach File	Allows to attach files emailing link to the survey/report or survey/report itself to the respondents.	Compose Email
Autofill	Allows to import some additional information on respondents along with their email addresses. This enables to pre-populate some questions (fill in responses automatically). It is available if 'Bulk Email' feature has been set.	Format Data File
BackButtRem	Allows to remove back button from the survey page.	Survey Rules
BranchOnRange	This feature means that the next question depends on the points scored by respondent.	Branch on Range Logic

Features	Description	Used In
BulkEmail	Allows to import a complete database of email addresses that is saved locally on the computer. This survey can be emailed to everyone in this database at the same time.	Email To List
Click Through	Allows to display how many respondents opened your survey even if nothing was completed and to show the response rate.	Surveys Home
Common Plugins	Enables common plugins for an account.	Rules
Copy Surveys with Reports	Allows to copy surveys with reports when designing survey by editing an existing survey with the help of "Copy with Reports" check box on Design Survey page.	Design Survey
Copy Surveys with Results	Allows to copy surveys with results when designing survey by editing an existing survey with the help of "Copy with Results" check box on Design Survey page.	Design Survey
Correct XML Scales	By default values for the XML export start from 0. If enable this feature values will start from 1.	XML Export
Crosstab	Allows to create Cross Tabela in reports.	Crosstab
Custom CSS	Allows to apply advanced design to surveys and reports by editing CSS styles.	Design Survey
CustDomainName	Allows to modify the domain name in survey or report URL.	Launch Survey
CustPalette	Allows to change the survey layout manually if none of the predefined color schemes are suitable with the help of Custom Colors Layout editor.	Layout
Custom Plugins	Enables custom plugins for user account.	Plugins
Custom Survey Buttons	Allows uploading your own survey buttons (Next, Back and Submit) on Layout page.	Layout
CustRankScale	Allows to create rank scales and edit or delete any of them.	Rate Items 3D Matrix
CustTextFormat	Allows to customize the formats that can be used by respondent while answering questions with pre-format option.	Customize text format
Dashboard	Use this feature to activate custom dashboard within the account for QlickView reporting.	Dashboard

Features	Description	Used In
Dashboard Add/Edit	This feature allows adding custom tabs to the default dashboard.	Dashboard
DuplicateEmails	This feature allows the sending of email invitations (during bulk distribution), to respondents with the same email addresses. This feature also assigns a unique code to each respondent (in the data file), so you can distinguish survey results and other attributes from the file for AutoFilling.	Email Survey To List Format Data File
EditResponses	Allows to edit survey results of the respondents.	Report by respondent
EducationPackage	The education package feature allows the user to set a time limit for filling out surveys and provides a view of the total score for each respondent in the report, when the answers have been supplied with point values.	Launch Survey Branch on Range
EmailReminder	This is an e-mail that is sent to respondents whose email addresses are in the survey Incompletes list.	Email Reminder
EmailReport	Allows to email the report or link to it.	Email Report
Enable API	Enables API.	Administration Page
Enterprise Plugins	Enables high-level enterprise plugins for user account.	Survey Rules
Export Unique Survey URL	Allows exporting the unique survey URL of each respondent along with the results into Excel.	Export to Excel
Export to XML	Allows to export your survey to XML by clicking the 'Export to XML' button on Survey Home page.	Survey Home
Filtering	This feature allows the user to apply complex filtering to the report, such as filtering on text, email address, date, etc. The user can also specify which responses to display in the report results.	Advanced Filter
Filtering Uses Wildcard	This feature is used along with Filtering feature and widens its capabilities to using wildcard characters.	Advanced Filter
Filtering Uses RegExp	This feature is used along with Filtering feature and widens its capabilities by using regular expressions for filtering results.	Advanced Filter

Filtering uses fulltext	In addition to complex filtering enables fulltext option for advanced text filtering.	Advanced Filter
Formula in text and images in reports	This feature allows the user to create and insert formulas into the text of the report elements.	Text and images
ImportRespondentData	The import response feature allows the user to upload responses from a CSV file into a survey.	Launch Survey Upload responses
Image Align L/R	Allows to set the alignment of the image (left, center, right) in top position and add arrows (Up Left, Bottom Left, Up Right, Bottom Right).	Add Image
Image Position	Allows positioning the image (left, top, right) relative to question text.	Add Image
JavaScript API	Enables JavaScript for a survey and opens access to survey elements.	Survey Rules
Language	Allows to select the language for the pop-up alerts and to design a survey in different languages.	Survey Rules
Links Answers	Allows to specify the way the information about responses to specific questions will be displayed in online report.	Report Rules
Manage Bounces	Enables the possibility to track the delivering of e-mail messages on E-mail Results page.	E-mail Results
Navigation Dropdown	Allows to navigate through the account pages using the dropdown box.	Survey and Report Editing Pages
One Touch Script	This feature navigates respondents to the next page, upon selecting one of the radio buttons.	Survey Rules
Panel Filter	Allows to filter the addresses according to the results of the selected surveys.	Address Book
Password-Survey	Allows to protect the surveys with individual passwords.	Password Protection Format Data File
PDFReport	Allows to convert the report to PDF format and to print it.	Publish Report
PDFSurvey	Allows to convert surveys to PDF format.	Surveys home
Preferred answer	Allows to use the 'Skip with alert' option. If respondents do not answer the question with the 'Skip with alert' option and submit the survey, they will be prompted to answer it but still they can skip it.	Survey Questions

Features	Description	Used In
PreferredMatrix	Allows to use the 'Compare one against another' question type.	Survey Questions
PrivateNotes	Allows to enter comments on the survey results of the respondents.	Edit Questions Summary Report
Profile	Allows to design profile surveys for Common-Password survey protection.	Common-Password Survey Edit Questions
Question Analysis Code	This feature is used for statistic analysis purposes	Optional Question Features
RandAnswer	Allows to display question answers in random order.	Edit Single Question
RandQuestion	Allows to display the questions in random order.	Edit Questions
Redirect	Enables to redirect the respondents to the necessary website after they have submitted the survey.	Survey Rules
RegularExpressions	Allows to use regular expression for designing custom formats.	Customize text format
RemoteFilter	Allows a report viewer add filters to the survey report online.	Report Rules Summary Report
ReplyTo	Allows to fill in the fields for 'Reply' address and undelivered emails.	Compose Email
ReportExpandText	Allows to expand text responses in online report. It should be activated on the 'Customize Report' page.	Report Items Summary Report
Report Logo	Allows to attach report logo.	Report Layout
Response Rate	Allows to show the response rate % (which is total number of completed surveys multiplied by 100 and divided by total number of completed and incompletd surveys) in the 'Completed' column in parentheses.	Surveys home
Salesforce integration	Allows to launch survey through SalesForce application.	Launch Survey
Search	Allows to search surveys by survey name, title, introduction or survey ID.	Surveys home
Section 508 Support	Enables Section 508 support for user account.	
SecureConnection	Allows to secure all survey data by encrypting it.	Launch Survey

Share Calculation	Allows to create a table or graph to show results of share calculation in online report and PDF.	Share Calculation
Show Results	Gives user an ability to allow survey respondents view their results.	Survey Rules
Significance	Allows to create a table or graph to show results of significance testing in online report.	Significances
SPSS	With this feature, the user can export survey results to SPSS.	Report Publish Options
Sort Respondents By Start Date	Allows sorting the reports by date the respondents started to take the survey.	
Statistics	Allows to apply statistical quantities to survey results.	Survey report
TimeSeries	This feature allows the user to add time series tables and graphs to the report.	Report Questions Time Series Graph
Two Color Layout	This features activates two color palettes so user can easily apply simple color design to a survey.	Survey Layout
Unique Export Plugins	Enables unique Export Plugins for user account.	Survey Rules
URLAppend	URL ID append This feature allows the user to apply a suffix to the survey URL.	Launch Survey URL Suffix
Workflow	Enables to receive emails or send them to the respondents or to any other email addresses when a particular response is selected.	Email Alert

LDAP USERS

LDAP (Lightweight Directory Access Protocol) is an open standard for a user security repository and authentication mechanism.

This feature allows managing users accounts stored inside an LDAP directory. Using LDAP, you can automatically create user accounts within application and prevent users from having to enter the login and the password when accessing the account.

Accessing an LDAP user database requires specific connection information about the LDAP server. To take advantage of the LDAP functionality, the server administrator firstly should adjust the LDAP server's parameters in the configuration file of the deliverable application.

The list of parameters to be modified:

- **IdapHost** - the IP address of the LDAP server;
- **IdapPort** - the LDAP server's port;
- **IdapUser** - the user name in LDAP;
- **IdapPassword** - the user's password in LDAP;
- **IdapBaseDnList** - the list of LDAP's pathes, delimited with semicolon.

After that log in the administration account and click the **LDAP Users** button to manage users.

Home > LDAP Users

Select users you want to open an account for

Your LDAP users

⊟ CN=Users,DC=worldapp

john.harris@worldapp.com
robert.sheiffer@worldapp.com
terese.crisci@worldapp.com
rebekah.demartino@worldapp.com
justin.paul@worldapp.com
william.morrell@worldapp.com

⬆
⬇

Add ▶

◀ Remove

LDAP users with an account

⬆
⬇

CN=Users,DC=worldapp

Save

*no more LDAP - user is no longer in your LDAP

The following page enables you to create accounts in the application for the selected users.

1. Use the **Your LDAP users** list box to select the specific user.
2. Click **Add** to move the user to the **LDAP users with an account** list box.
3. To remove the added users, select them from the **LDAP users with an account** list box and click the **Remove** button.

Notes:

- Hold down CTRL and click the left mouse to select several users at once.
- The user marked with * is no longer in your LDAP.
- Click the **Save** button for the changes to take effect.

SECURITY SETUP

This page allows you to set up the security regulations and to manage the password settings for all account types. Using this administration resource, you can adjust the security policy of the account access, reset the passwords, deactivate and reactivate the accounts.

To access the security settings you need to log in the admin account and click the **Passwords** button.

Home > Passwords

User passwords expire in

☒ Never Expires
☐ Expires in days

Enforce password history

☒ Is not logged
☐ Remember passwords

Password complexity requirement

☒ No Restriction
☐ Must mix alpha and numeric
☐ Must contain special characters

Minimum password length

☒ Not Limited
☐ At least characters

Account expiration requirement

☒ Never Expires
☐ Expires if idle for days

Account lockout policy

☒ Do not lock accounts
☐ Lock accounts for minutes after invalid attempts

SaveCancel

This page provides the possible security settings:

1. **User passwords expire in.** Allows you to manage the password validity term. The supported options are:

- Never Expires (by default);
- Expires in .. days (The value must be between 0 and 365).

Enforce password history. Enables you to determine the number of unique new passwords that have to be associated with a user account before an old password can be reused. The possible options are:

- Is not logged (by default);
- Remember .. passwords (The value must be between 0 and 10).

Password complexity requirement. This security setting requires the password to meet the complexity requirements. The possible options are:

- No Restriction (by default);
- Must mix alpha and numeric (the password must contain at least one numeral and one letter);
- Must contain special characters (the password must contain one of the following non-alphabetic character: !, ", #, \$, %, &, ' (,), *, +, -, ., /, :, ;, <, =, >, ?, @, [\,], ^, _ ` {, |, }, ~).

Minimum password length. Enables you to set the minimum password length. The supported options are:

- Not Limited (by default);
- At least characters (The value must be between 0 and 16).

Account expiration requirement. Allows you to limit the term the account can stay idle. The possible options are:

- Never Expires (by default);
- Expires if idle for .. days (The value must be between 0 and 365).

Account lockout policy. This setting disables a user account if an incorrect password is entered a specified number of times over a specified period. You may set the following option:

- Do not lock accounts (by default);
- Lock accounts for .. minutes after .. invalid attempts (The value must be more than 0 for minutes and between 1 and 10 for attempts).

Notes:

- Click the **Save** button for the changes to take effect;
- Click the **Cancel** button to undo all actions up to the last saved one.

TEMPLATE ACCOUNT

Template account is a system account that is used to create and store survey and question templates, as well as custom themes. Later they can be used in regular and workgroup accounts by regular users.

The default template account name that goes with your installation is 'template'.

When you log in to the template account you will see the list of folders that contain default template surveys, CSS templates and question library available for your regular users.

Creating Survey and Question Templates

Survey templates are available for all accounts within your environment and are used for quick survey creation. They are divided into categories and contain list of commonly asked questions depending on the category they belong to. Users that create new survey using templates can then customize newly created surveys within their personal accounts by adding new questions, deleting or editing predefined questions.

To add new survey template:

1. Click the **New Survey** button at the very top of template account.
2. Select '**I want to create my survey from scratch**' option to create survey template adding questions you need.
Select '**I want to create my survey using a template**' option to create survey template by customizing existing template. Then click **Next**.

☐ I want to create my survey using the **question library**

☐ I want to create my survey using a **template**

☐ I want to create my new survey by copying an **existing** survey

☒ I want to create my survey from **scratch**

☐ I want to create a **common-password** survey

Next ►

3. Give unique name to your survey template.
Note: survey name will be displayed to the other users when they create survey from templates.

4. Select category you want to create survey for from the second step. Use the 'Templates' section to add survey template or 'Question Library' section to add current survey questions to the library for public use.

1
Survey name For use within system

Product Development Survey

2
Select category for this survey

None

5. Save your changes and click **Next**.
6. Add as many questions to your survey as you need and proceed with other survey design procedures is necessary.

Now your survey template or questions from the Question Library are available for all users.

Template Management

By default all template surveys and questions from the Question Library are organized within different categories. On the '*Template Management*' page you can customize these categories or add new ones.

1. Click the '*Manage Categories*' link from the '**Surveys**' home page of the template account.

Template Management

Back

Forms Templates

Forms Library

Question Library

Templates

Templates by Industry

[1] 05 Product Development

[2] 06 Auto

[3] 07 Bank

[4] 08 Education

[5] 09 Healthcare & Pharmaceutical

Hidden [6] 10 Insurance

[7] 11 Internet

[8] 12 IT

[9] 13 Retail

[10] 14 Travel

Templates by Type

[1] 01 Customer

[2] 02 Employee & HR

[3] 03 Event

[4] 04 Business

Edit Category

New Category

Back

2. If your installation is an Extreme Form application, use the 'Forms Templates' and 'Form Library' options to customize the categories. Otherwise use the 'Templates' and 'Question Library' options.
3. Select the category you want to edit and click the **Edit Category** button.
4. Edit category name and assign group where this category should reside. You can also number category by typing its number. The check box available next to the numbering field shows or hides the category from the templates list.
5. Click the **Save** button to apply changes.
6. Go back to customize other template account properties.

CSS Templates

Along with the survey and question templates you can create CSS templates (themes). They can later be used by regular users to improve survey design and appearance from the **'Theme Library'** page.

1. Create new survey from scratch or use available template. Follow the default survey design steps.
2. Go to the survey **'Layout'** page.
3. Click the **Theme Library** button.
4. Click the *'Manage Categories'* link from the bottom left part of the page.
5. Edit default categories if necessary or click **Add New** to add your own category.
6. Go back and click the *'Add New Theme'* link to add new theme template.
7. While creating categories or themes follow the standard steps described in the **Key Survey User Manual** and **Online Help** file.

When this is done, regular users will be able to use CSS templates and apply them to their surveys within just a few steps.